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ABSTRACT

The Relating, Discovering, Advocating, and Supporting (RDAS) notion of concept selling is applied to the marketing of products and services emanating from educational research and development. The four RDAS categories are further divided into 12 sequential and interdependent tasks: Client Identification; Fact Finding; Planning; Establishing Credibility; Targeted Research; Focused Planning; Problem Analysis and Agreement; Planning the Presentation; Presenting; Facilitating the Decision; Achieving Closure; and Rediscovering. Rationale, practical suggestions, and examples related to marketing task accomplishment are presented within the discussion under each major heading. This RDAS schema provides a template against which practitioners may assess their current activities, and may serve as a basis for establishing a new genre of management and cost accounting systems that can be applied to marketing educational products and services. (Author/CHV)

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CONCEPT MARKETING OF EDUCATIONAL PRODUCTS
AND SERVICES--THE RDAS APPROACH

No. 11

Robert G. Green

Northwest Regional Educational Laboratory

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ABSTRACT

Concept Marketing of Educational Products and Services--The RDAS Approach

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This paper applies the *Relating, Discovering, Advocating and Supporting* (RDAS) notion of concept selling to the marketing of products and services emanating from educational research and development (R & D). The four RDAS categories are further divided into twelve sequential and inter-dependent tasks: Client Identification; Fact Finding; Planning; Establishing Credibility; Targeted Research; Focused Planning; Problem Analysis & Agreement; Planning the Presentation; Presenting; Facilitating the Decision; Achieving Closure; and Rediscovering. Rationale, practical suggestions and examples related to marketing task accomplishment are presented within the discussion under each major heading. The RDAS schema, as applied by the author to the marketing of products and services of educational R & D, provides a template against which practitioners may assess their current activities and may serve as a basis for establishing a new genre of management and cost-accounting systems that can be applied to marketing educational products and services.

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CONCEPT MARKETING OF EDUCATIONAL PRODUCTS AND SERVICES--THE RDAS APPROACH

In the profit-oriented arena of buying and selling, one type of commercial activity requires a high degree of competence on the part of sales personnel and an unusually long-term relationship with a prospective buyer. Sometimes this process is called *concept selling*. Examples of this kind of concept selling are the techniques employed by life insurance companies. The sales process here involves everything from establishing trust with a buyer to the follow-up and account servicing. One key assumption on which concept selling is based can be stated as follows: Given that all life insurance companies use similar actuarial tables and are similarly held accountable by their stockholders to produce a reasonable return on investment, it follows that the critical sales variable involves the degree to which the agent convinces the buyer that (1) the product meets high priority needs of the buyer, (2) the agent is a trustworthy, concerned individual who has the buyer's best interests at heart and (3) the agent has the professional skill and knowledge to provide the desired level of service.

In my reveries of late regarding the issues and procedures necessary to marketing a comprehensive, process oriented, change strategy such as the School-Community Process (SCP),² I have been struck by their similarities with the elements of concept selling. This analogy is not a perfect one, but it has led me to some notions about an approach to what, for the sake of discussion, I'll call *concept marketing*.

Having chosen to distinguish between these two terms, I should attempt to clarify what I see as the similarities and differences between them within the field of education. Concept selling is similar to concept marketing in that both require a high degree of competence on the part of the seller or marketer and a relationship with the buyer or client system which requires relatively frequent interaction over an extended period. Another similarity is that both typically involve a product, often intangible. Although the product of the concept marketer may indeed include such tangible software as guides, handbooks and manuals, these items are

generally considered as tools within a larger, more comprehensive system of an intangible nature such as training, consultation and/or technical assistance. The significant differences between concept selling and marketing fall within the traditional definitional differences between the terms selling and marketing. Selling is generally considered to be only one of several functions ascribed to the larger category of marketing. Unlike the concept salesperson, the concept marketer should not only be conversant with, but a knowledgeable practitioner of the skills pertaining to product development, product design, promotion, market identification, pricing and distribution.

I hope the following discussion of an approach to concept marketing may be generalizable to that relatively large quantity of concepts, models and strategies which have emanated from and continue to be produced by the several laboratories and centers in America engaged in educational research and development.

The purpose of this paper, then, is to commit these notions to the written word and invite comment and opinions from colleagues who are engaged in the somewhat muddled and, as yet, ill-defined tasks of marketing comprehensive models of training, consultation and/or technical assistance.

While the tasks of concept marketing may be at present ill-defined, the problems confronting those engaged in the tasks are fairly apparent. Hough,³ for example, presents a typical explanation of the problems by listing what he calls "favorable and unfavorable indicators of diffusing innovations." According to Hough, when the innovation (concept) to be marketed is (1) inexpensive, (2) easy to comprehend, (3) item divisible, (4) compatible with existing systems and has (5) visible results and can be (6) purchased or adapted by individuals--then the task of marketing that concept is fairly straightforward. If, however, the innovation (concept) to be marketed has two or more of the following characteristics, marketing becomes of necessity more elaborate and complex:

Unfavorable Indicators

Costly

Results not readily apparent (requires delayed gratification)

Requires new support (changes in existing systems)

Requires group purchase or adoption

Difficult to explain and/or comprehend

Requires a "package" purchase (not item divisible)

II. THE RDAS APPROACH

When I consider the variety of tasks necessary to successfully market comprehensive models of training, consultation and/or technical assistance (most of which have two or more of Hough's unfavorable indicators), I find it helpful to think of those tasks as falling into four separate, but interdependent categories. The categories do not originate with me; they can be found throughout the commercial sales literature.⁴ Sometimes different terms are used; sometimes there are more or fewer than four categories; but the salient notions are quite similar. The categorization I prefer is *Relating, Discovering, Advocating and Supporting* (RDAS).

Although RDAS per se is not unique, this paper does chart some new territory. First, it applies the RDAS notion to the marketing of the products and services of educational research and development (R & D). Second, and maybe more importantly, it removes RDAS from the realm of theory by dividing the four categories into twelve major tasks and by providing rationale, suggestions and examples which relate to successful task accomplishment. As such, this paper provides a template against which marketers of educational products and services may assess their current activities. That is not to say that I believe RDAS to be the alpha and omega of concept marketing; rather, I believe it to be a useful first step to bring order to what may now be chaotic--to systematize that which may now seem almost serendipitous.

III. RELATING

Appropos of the life insurance selling example I think of the category of RELATING as subsuming those initial tasks which are necessary to identify high potential clients and to begin to establish credibility and a trusting relationship with them by achieving four major tasks, each discussed in detail on the next few pages.

Task No. 1: *Client Identification*. This task, at first glance, may appear to the sophisticated reader as being so obvious that it is hardly deserving of mention. It is my contention, however, that a great deal of

time and resources can be conserved and a good many false starts avoided if the marketer attends to this activity with considerable care. "The whole world is my oyster" is an admirable viewpoint, but when employed by a concept marketer it can become a very frustrating and wasteful tactic. Of the myriad of agencies, institutions, organizations and individuals who can possibly be viewed as potential users of educational R & D products and services, which ones represent those relatively few who will find the marketer's particular products and services most useful in meeting their unique needs? Often the marketer can rely on his or her experience and own deductive powers to reduce the number of potential clients to a workable number by asking such questions as: Which groups or agencies could *logically* use what it is that is being marketed? Of those, which seem to have the most pressing or urgent need?

Perhaps new federal or state legislation has created a need within certain agencies or groups. Maybe recent results of national or statewide assessments have pointed out certain deficiencies relevant to particular groups or agencies. Are there any features of the products and services being marketed, which in and of themselves, tend to limit the potential client group? Do the products and services apply only to certain age groups, ethnic populations or socio-economic groupings? Are the products and services designed to affect only teachers, or administrators, or students, or citizens, or board members or a combination of one or all of these groups? The answers to these and other questions will serve the concept marketer well and will help to shape and guide the remaining tasks subsumed under the category of RELATING.

Task No. 2: *Fact Finding*. Having identified the high potential client groups, but prior to face-to-face contact with a given client group, the R & D concept marketer should attempt to find out as much about that client group as possible. What kind of agency, group or institution is it? What is the nature of its mission (regulatory, service, etc.)? What is its jurisdiction, if any? What is its statutory authority, if any? Who are its constituents? Who are its employees? What do they do? How are they organized? What kind of management system does the client group employ?

Concept marketers can obtain answers to these and similar questions by writing for copies of annual reports, organizational charts and in-house publications; tapping into their own informal network of friends and colleagues; and looking into their own institutional files for relevant information.

Task No. 3: *Planning*. Having completed the initial round of fact finding, the concept marketer should synthesize the findings and develop a tentative plan of action. This plan should address such concerns as the following: How should the initial approach to the client group be made? What should it consist of? What client priorities have been uncovered in research that can be used as "openers"? Are there particular issues which are regarded as "sacred cows" within the organization? Does the R & D institution have any recent past or existing relationships with the client group itself? With similar client groups? With constituents of the client group? If so, how can those be best utilized? What are the most likely points of initial contact within the client group organizational structure? How can the client group's interest be best stimulated? Are there any likely candidates within the client group for becoming an internal advocate? The internal advocate can indeed be an important ally to the concept marketer. Persons in the agency who have dealt successfully before with the marketer's own institution are likely candidates for internal advocates; however, when dealing with a client group for the first time, the marketer will find his or her time well spent by trying to cultivate such an advocate. The advocate should be influential in the client group, but that does not necessarily mean that the advocate should be in a high place within the client group's hierarchy. It does mean that the advocate's opinion and judgment should be valued by hierarchical figures in the client group and that the advocate should have a personal style and demeanor which is compatible with the client group's decision makers. Ways and means of developing such an advocate are discussed in the following activity.

Task No. 4: *Establishing Credibility*. If the initial fact finding and planning have been adequate, all that remains is to implement the plan. Implement it, that is, with the knowledge that no plan is foolproof and that adjustments and mid-course corrections will inevitably have to be made when one is dealing with real people in real situations. In most instances,

this activity requires the concept marketer to be on-site and engaging in face-to-face interaction with members of the client group, explaining his or her desire to assist the clients in exploring the degree of "match" between their high priority problems and concerns and the R & D products and services offered. It is possible that in some cases this activity could be conducted by means other than "on-site, face-to-face interaction," but such cases are rare.

This is the time to contact (if one has been identified) or develop an internal advocate within the client group. How the marketer chooses to do this, of course, is dependent in large measure on the personal style of the marketer. Some individuals work best in a low-key manner, exuding a quiet, subdued competence. Other marketers conduct themselves more overtly and in some cases almost flamboyantly. Whatever the style of the marketer, it is generally wise to select an internal advocate with a similar or complementary style. "Cultivating the relationship" does *not* mean engaging in one or more of the well-known, but ethically questionable practices such as purchasing gifts, giving away free samples, or buying lunches or refreshments. What it *does* mean is talking openly and warmly with the potential advocate; finding areas of mutual interest and exploring them; sharing "inside" information with the potential advocate about the marketer's institution and/or the products and services being represented; and listening, empathetically and actively, to problems, concerns and issues which are deemed important by the advocate and related to the advocate's own work and that of his or her agency.

The key in most cases is empathy--the ability to think with rather than about the other person. It's also useful to know that most clients and prospects share certain basic needs: They need to *feel* that they are partners in the discussion with the salesperson; they need to *feel* that their own opinions and beliefs are respected even when they don't always accord with reality; and they need to *feel* that the decision to act is their own.⁵

The important point to remember at this stage of the task is that the concept marketer's objective is to establish his or her own credibility and that of his or her institution with the prospective client group.

The degree to which the marketer is successful in doing so will determine, to a great extent, whether or not tasks related to the DISCOVERING category can be achieved.

IV. DISCOVERING

Many very critical tasks need to be accomplished within this category of activities. The marketer has by this point effectively gained entry to the client system and with the aid of an internal advocate(s) sets about collecting and analyzing data which will prove invaluable in the succeeding category of activities. He or she collects and analyzes the client group's high priority problems, identifies key decision makers, analyzes the group's decisioning processes and assists the group to develop solution criteria. These three major tasks are discussed in detail under Nos. 5, 6 and 7.

Task No. 5: *Targeted Research*. Once entry into the client group has been gained and credibility established, the concept marketer again enters a data gathering stage; however, the distinguishing features of Task No. 5 are primarily ones of perspective and intent. In this task, the marketer is inside the client group and, ideally, has the aid of an *internal advocate*. Consequently, the marketer does not have to rely only on document review and other unobtrusive measures. In terms of intent, in Task No. 2, *Fact Finding*, the purpose was to gather information to assist in gaining entry and establishing credibility; in Task No. 5, the information gathered should focus specifically on (a) identifying those problems, issues, and concerns which the client group finds most perplexing and of highest priority, (b) identifying the people in the client group who are key to resource allocation and project approval decisions and (c) identifying the way (formal/informal) in which such decisions are typically made.

Task No. 6: *Focused Planning*. In this task, the concept marketer synthesizes the findings from Task No. 5 by displaying the decision flow and interrelationships between the various decision-making groups and individuals, and sorting the client group's high priority problems into three categories. It may be useful for the concept marketer to construct a flow chart of how a decision to use the R & D product or service would

be made by the client group. In developing the chart, consideration should be given both to hierarchically related power and to the concept of shared decision making and informal influence networks in the client agency. The three sorting categories, referred to above, are simply: (1) those problems which can be addressed directly by the R & D product or service, (2) those which can only be addressed indirectly, and (3) those which the product or service cannot address. After completing these steps, the concept marketer should plan a problem analysis method for each identified critical decision-making group or individual and schedule an appointment with each to conduct Task No. 7.

Task No. 7: *Problem Analysis and Agreement*. The marketer engages each of the selected decision makers or groups in a process which results in further clarification of the problems [identified in No. 6 (1) and (2) above]. Who or what is affected by the problem? What seem to be the causes of the problem? What kind of problem is it? What is the goal for improvement? What are the solution criteria, in terms of cost, performance, risk etc.? The most critical element of this activity is that the marketer must strive to achieve agreement among the selected decision makers on the goals for improvement, particularly for the No. 6 (1) type problems, and on solution criteria. This task should close with the marketer promising to study the improvement goals and solution criteria which the client group has generated and to return in the very near future with some ideas for their consideration.

V. ADVOCATING

The tasks (Nos. 8 and 9) included under this category require the concept marketer to apply all the data he or she has gathered in the earlier activities and bring to bear the full range of his or her communication skills.

Task No. 8: *Planning the Presentation*. When one is describing an interdependent set of activities, it is difficult and perhaps confusing to label one activity as being more vital to eventual success than another. However, at the risk of confusion, I am convinced that this particular task has a critical effect on the outcome of RDAS. In planning the presentation the concept marketer should address five questions: How to present? To whom to present? Where to present? When to present? And what to present?

All the information, thoughts, feelings, and intuitions that the marketer has gained with respect to a given client group should come to bear on generating answers to these questions. How many presentations should be made? One to each decision maker or group contacted, or should the marketer try to gather them all in one place? Should the presentation utilize prepared charts, slides, handouts, or should it be impromptu and involve newsprint charts and transparencies created on the spot; or should it be a combination of both approaches? How should the presentation be introduced? By whom? In what context? How long should it be? Should it be followed by a question and answer period? To whom should it be made? Who are the critical decision makers? Where should it be made? On whose "turf"? What should the room arrangement be? Who should be responsible to set it up (and clean up afterwards)? When should the presentation be made? What is the best day of the week for such a meeting for a given client group? Does the client group's planning/budgeting system yield any data relevant to timing? Are there any organizational or other crises which should be allowed to be resolved before scheduling the presentation? What should be presented? What problems of the client group does the R & D product/service address? To what extent does the R & D product/service match solution criteria? What are the options for R & D product/service configuration and implementation? The interesting, and sometimes frustrating, aspect of this particular planning activity is that it must be repeated for each client group. The answers generated as being appropriate to one will likely not be appropriate for another. It is this set of activities, perhaps more than any other, in which the concept marketer can be creative and utilize the full range of diagnosis, communication and problem-solving skills.

Task No. 9: *Presenting*. As was the case in Task No. 4, if the research and planning have been done well, all that remains is to do it. However, it is unlikely that the presentation will go exactly as planned. Consequently, it is a good idea to be prepared with contingency plans and be alert and flexible enough to detect when a change is necessary and act accordingly. Another point to consider here is the individual and interactive nature of the concept marketer's presentation. Regardless of the group's size, each person should feel as if the presentation has been tailor made for him or her. This can be accomplished by frequent reference

to comments and concerns of people and work units who have participated in one or more of the earlier data gathering activities. The presentation can be interactive, if it includes opportunities for give and take between the presenter and members of the client group. Depending on the nature of the decisions made during the accomplishment of Task No. 8, *Planning the Presentation*, the presentation may end with next steps in the decision process being mutually agreed upon, or with the presentation being considered as the preliminary step to activities in the SUPPORTING category. For example, Tasks 9, 10 and 11 could be accomplished in a single meeting.

VI. SUPPORTING

Supporting the client group's decision making is the last, but maybe the most important, category of tasks (Nos. 10, 11 and 12) in the Relating, Discovering, Advocating and Supporting (RDAS) approach to concept marketing. All too often, inexperienced marketers feel their job is finished when they have completed their presentations. The RDAS approach to concept marketing requires a high degree of marketer involvement in three additional tasks: facilitating the decision, closure and rediscovery.

Task No. 10: *Facilitating the Decision*. During these activities the concept marketer engages the client group in a debriefing of the presentation. What did they like best about the proposal? What did they like least? How could the things they liked least be made more attractive? This method of facilitating the group's decision has at least two advantages: (a) first, it does not require an immediate yes or no from the client and allows space for reasoned consideration, and (b) it creates an atmosphere of partnership, of collaboration between the concept marketer and the client group. In short, this activity sets the stage for mutual adaptation.⁶ The marketer should be prepared at this juncture to deal appropriately with new ideas relative to problem solution which may have emerged during the discussion. The ability to modify the proposal quickly--i.e., "thinking on your feet," can be a powerful asset to the marketer in facilitating the clients' decisions. In practice, my colleagues and I have found that some clients require a "gestation period" at the conclusion of this activity. They need to think about what has

been proposed--to check it out with others. Whatever the case, this is a critical stage of the process, and care should be taken not to allow too much time to elapse before engaging in the next activity.

Task No. 11: *Achieving Closure*. Unlike the emphasis placed on "closing the sale" in much of the commercial sales training literature, this activity should not be thought of by the concept marketer as the climax of his or her efforts. It is true that the client group will likely make a "go/no-go" decision regarding the R & D product or service during this activity, but the high emotion, high tension elements of the commercial "closing" should be absent here. The concept marketer should deal with all involved parties, emphasizing the strengths of the proposal (as identified by the clients in Task No. 10) and ameliorating the weaknesses in the proposal to the extent possible (considering the constraints inherent in the R & D product or service being marketed). In some instances, it may be appropriate for the marketer to offer, and be prepared to deliver, assistance to the client group in securing necessary financial resources to consummate the agreement. Even if the client group makes a "no-go" decision, the concept marketer and his or her R & D agency should feel a sense of accomplishment for having helped the client group identify needs, prioritize them, establish solution criteria, and make a data-based decision; this I believe to be the major difference between the concept marketer and the commercial sales person. In the event of a "no-go" decision, the marketer should by no means discard a given client's file. It should be carefully maintained and updated (see Task No. 12) in the event that changing conditions within the client group or the marketer's own institution indicate that further contact would be advisable.

Task No. 12: *Rediscovering*. Depending on the outcome of Task No. 11, rediscovering is a set of activities which either consists of maintaining and updating a "no-go" client's file, or one which occurs at intervals after a given client has purchased the marketer's product or service. In the first instance, the marketer should contact a client who has made a decision not to purchase at least once or twice a year. Telephone or written contacts, rather than personal visits, are probably sufficient for this purpose. The aim of the marketer here is not to

badger the clients, but to make friendly inquiries about whatever progress the clients may have made toward resolving their high priority problems and to determine whether any significant changes have occurred in the client group or its context which the marketer may need to know. The marketer should record any significant information gathered by such contacts in that particular client's file and establish a procedure for routinely reviewing such files.

In the case of a client's decision to purchase, the *Rediscovering* activities are aimed at gathering data regarding the efficacy of the product or service from the client's viewpoint. A case may be made for not including this activity under the marketing function at all, much less under the SUPPORTING category. However, my rationale for doing so is that the concept marketer is concerned with how the R & D product or service is performing for two reasons: (a) to build self-renewal and client feedback into the continuing marketing effort, and (b) to support the client group's own decision making regarding continued use, adaptation and incorporation⁷ of the R & D product or service. Some of the questions asked of clients during this activity could include the following: Are there any alternative configurations of the product or service which clients feel would have been more effective, useful or appropriate to their needs? Where could improvements be made? Which needs of the client were met by the product or service? Which were unmet? Of both met and unmet needs, which were anticipated and which unanticipated?

VII. RDAS NOT NECESSARILY LINEAR

My explication of the RDAS approach to concept marketing in this paper has taken a "worst case" point of view. That is, I have purposely displayed RDAS as a linear system, with one task accomplishment being the prerequisite of the next. Such sequencing is a convenient literary device, but can be misunderstood. I do not mean to imply that in all cases a concept marketer must activate each activity in its prescribed sequence with each client. As my colleagues and I in the Rural Education

Program of the Northwest Regional Educational Laboratory have used the RDAS approach, we have "discovered" several variations of the approach presented here which seem to work well under certain circumstances. It is not my intent to explain those variations here; instead, I wish only to inform the readers that in practice, we have found the RDAS approach to be flexible enough to adapt rather easily to unique marketer-client situations. My best advice to anyone wishing to try RDAS is to experiment with it--collect cost and effectiveness data--"invent" your own variations--and then decide how and if you wish to incorporate RDAS into your operation as standard practice.

VIII. SUMMARY

In summary, then, the RDAS approach to concept marketing can be outlined as follows:

Relating

1. Client Identification
2. Fact Finding
3. Planning
4. Establishing Credibility

Advocating

8. Planning the Presentation
9. Presenting

Discovering

5. Targeted Research
6. Focused Planning
7. Problem Analysis & Agreement

Supporting

10. Facilitating the Decision
11. Achieving Closure
12. Rediscovering

Before the explication of the RDAS notion, concept marketers in educational R & D agencies have had few models of selling behavior to emulate except the rather standard, one-way selling process typical of the drummer and snake-oil salesmen of 19th century America. Although a few variations have evolved from the standard method, the modern day Willy Loman follows a sequential "pitch" which generally consists of seven steps:

- | | |
|-----------------|-------------------------|
| 1. pre-approach | 5. presentation |
| 2. approach | 6. answering objections |
| 3. opening | 7. close |
| 4. fact-finding | |

In contrast, the concept marketer employing the RDAS approach should understand that while selling does move from point to point through time, it is an interactive process, not one-way. It is also empathetic--the concept marketer has to listen to client feedback and react accordingly to shape, tailor and customize the products and services to the unique needs of each client. Having established trust and credibility with the client, the concept marketer has set the stage for mutual adaptation. The client's own problems and needs are given new form and shape by the concept marketer's probing, problem-solving methodology. RDAS, then, is a needs-oriented, client-centered, interactive approach to marketing, which systematizes selling and removes it from the realm of art and magic and more closely allies it with science. RDAS can be planned, charted, monitored and its effects can be related to its costs in ways which are quite amenable to modern management and accounting practices.

The educational R & D community is seeking a systematic method of clarifying, implementing, managing and accounting for marketing and dissemination activities. I believe the RDAS approach is a method worthy of serious consideration.

FOOTNOTES

¹This paper is based on two earlier versions: the first was presented in San Francisco at the California Evaluation and Research Association Convention in November, 1976; the second version was presented in Seattle during the annual meeting of the Western Psychological Association in April, 1977.

²The School-Community Process is being developed by the Northwest Regional Educational Laboratory under a grant from the National Institute of Education, School Capacity for Problem Solving Group. The goal of the strategy is to strengthen the capacity of small school districts to increase public support for educational programs by providing mechanisms and procedures to engage representative school-community groups in shared educational decision making and systematic problem solving.

³Hough, Granville W. Technology Diffusion. Mt. Airy, Maryland: Lomond Books, 1975, 27.

⁴For example: Thompson, Joseph W. Selling: A Managerial and Behavioral Science Analysis. New York: McGraw Hill, 1973; or Cribbin, James J. Consultative Selling. New York: Amacom, 1973.

⁵Christian, Robert S. "Reconciling Personal and Organizational Needs in Selling," Xchange, Issue No. 5, Greenwich, Connecticut: Xerox Corporation, 1976, 3.

⁶Berman, Paul and McLaughlin, Milbrey. Federal Programs Supporting Educational Change, Vol. IV: The Findings in Review. Chicago: Rand McNally and Co., April 1975, 19.

⁷Ibid., 11-13.

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